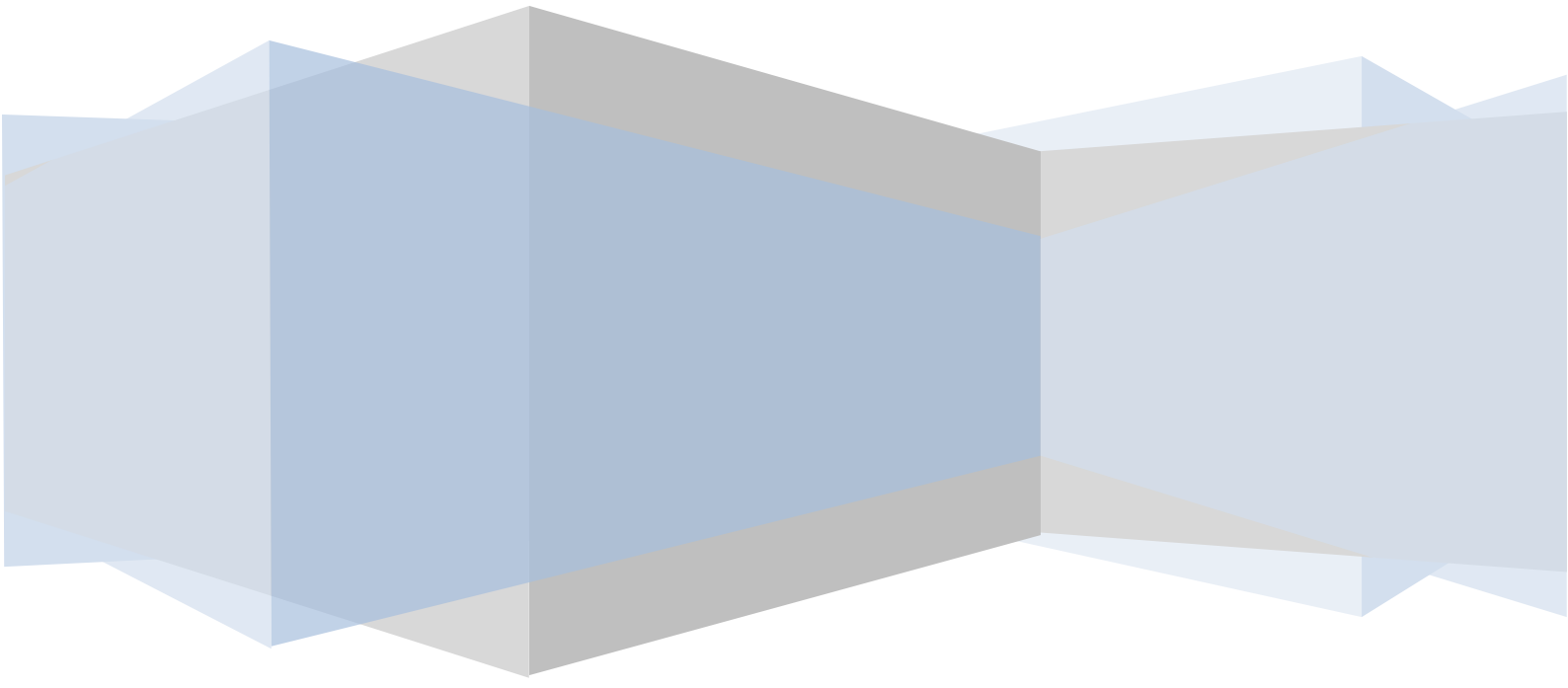
Health Education North Central and East London
Health Education North West London
Health Education South London

NMET Workforce Development (CPPD) Portal User Guide



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Introduction

The purpose of this document is to give a brief overview of the features of the NMET Workforce Development (CPPD) Portal website.

This guide will provide guidance to learners, Education & Training Leads and their representatives on how to search for Workforce Development (CPPD) and how to allocate and spend their indirect annual budget.

1.2 What is the NMET Workforce Development (CPPD) Portal?

The NMET Workforce Development (CPPD) Portal is a website designed for all non-Medical staff working in the NHS in London to peruse the Education & Training available via the London Contract for the 2015-16 academic year. The Education & Training Leads within eligible organisations and their nominated representatives are able to log on to the Portal and commission their organisation's Indirect CPPD activity for the 2015-16 academic year. Learners at organisations will also be able to use the Portal to search for CPPD provision.

Please note that the Portal supports **indirect** commissioning activity only. **Indirect** refers to the funding allocation each NHS organisation receives to commission activity at the 15 contracted Education Providers.

London LETB's: HESL, HE NWL, HE NCEL

Education Provider: previously known as HEI, Higher Education Institution

Eligible Organisation: previously known as Trusts

Commissioning Body: previously known as SHA

ETL (Education & Training Lead): previously known as Trust Commissioner

Representative: previously known as Trust Rep

1.3 How do I access the NMET Workforce Development (CPPD) Portal?

The Portal is a web based package so essentially any internet connected machine with a working browser will be able to access the system. Hardware which is extremely old will be able to access the system but the browser will react in a slower manner than if accessed on a more modern machine.

The below would be our minimum recommendation for a reasonable experience but this does not mean older machines will not work, they will simply be slower:

- Any operating system
- Internet connected, ideally broadband
- At least 1G of RAM
- 1Ghz processor or equivalent
- No direct free disk space is required for the application to run
- IE 6 and above will be supported along with latest versions of Firefox, Chrome and Safari

The website does not require any cookies or applets to be downloaded or enabled. However some IT security profiles do restrict sites that can be accessed. If this practice is undertaken by your IT department please ask them to add the website to their permitted list.

The URL for the portal is https://nmetportal-london.nhs.uk/ please remember to update and change any bookmarks or favourites you may have set up for the 14-15 commissioning cycle as the website is now hosted on a different server and bookmarks should be updated.

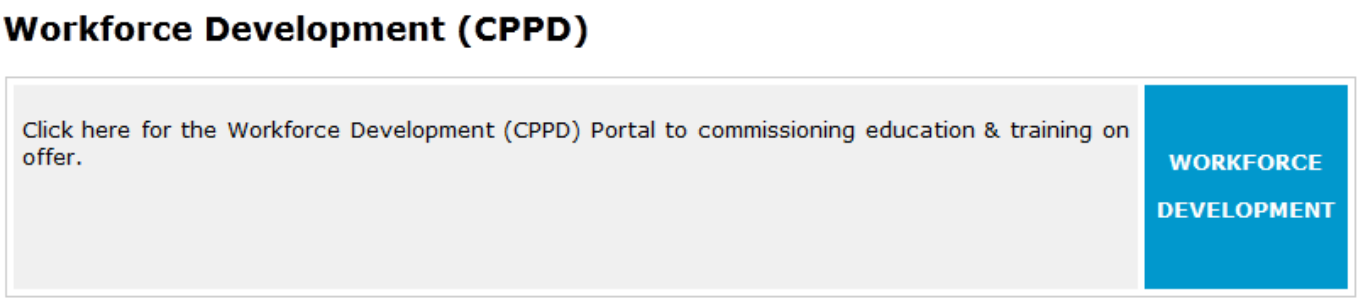
Public user search

Any member of the public can access the Portal and use it to search for Workforce Development (CPPD). **A log in and user name is not required**.

All visitors to https://nmetportal-london.nhs.uk/ will be taken to the homepage as shown below

Portal
Forgotten Password?
Email
Password
LOG IN
NHS
Health Education
North Central and East London
North West London
South London
HOME
Welcome to the Non Medical Education and Training Portal for the London LETBs
Health Education South London | Health Education North Central and East London | Health Education North West London
This Portal has been designed by the Shared Services that supports the three LETBs, for their constituent organisations

Once logged in please click on the WORKFORCE DEVELOPMENT link.


Workforce Development (CPPD)
Click here for the Workforce Development (CPPD) Portal to commissioning education & training on offer.
WORKFORCE DEVELOPMENT

NB this option is only visible to registered users but you **do not** need to be a registered user to search for content

2.1 Basic home page search

On the right hand side of the home page is a box to search for content. You can enter a key word such as "mentorship", a combination of words such as "cardiac nursing", the full title of the content you are looking for or the course code if known.

Please note if you use **"** **"** around two phrases, the search function will return content that includes those two words together. E.g. if you enter mental health the search will return all content that contains the word mental and/or health.

If you enter **"**Mental Health**"** into the search function then the search will return content that has the term mental health included, as if you had used the terms mental+health

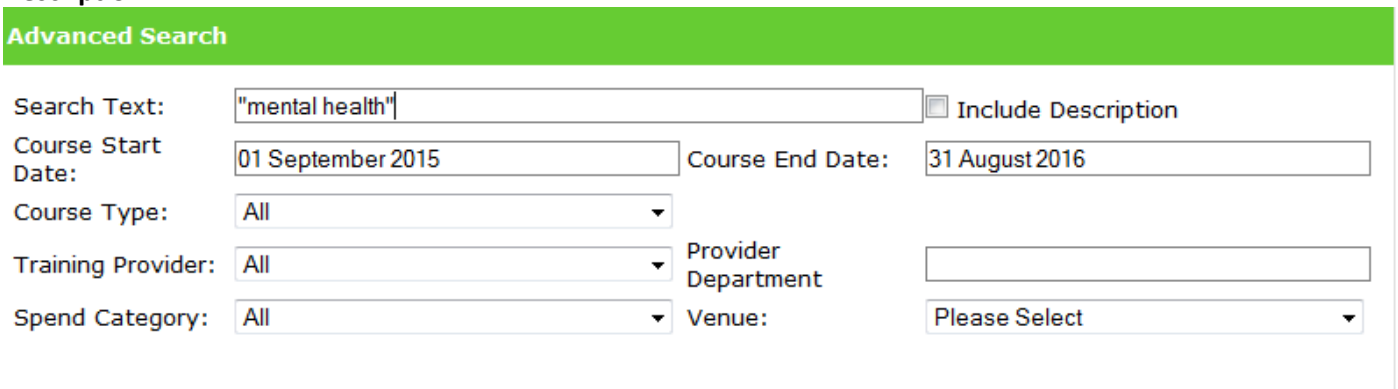
You can also use the keyword 'and' in the search text to specify that you wish to match two words. Other accepted keywords are:

- 'and not': to match the first word while excluding the second,
- 'or': the default keyword that will match one word or the other

Multiple keywords can be used in each search, so the search 'cardiac **and** nursing **and not** specialist' will return all cardiac and nursing results where there is no mention of the word 'specialist'.

Entering the course code, if entered correctly, will return just the course detail it relates to.

Please note, the search function has a default setting of searching the **course title only**. If you wish to expand the search to include the text in course description, please select **Advanced Search** and enable the tick box **Include Description**.



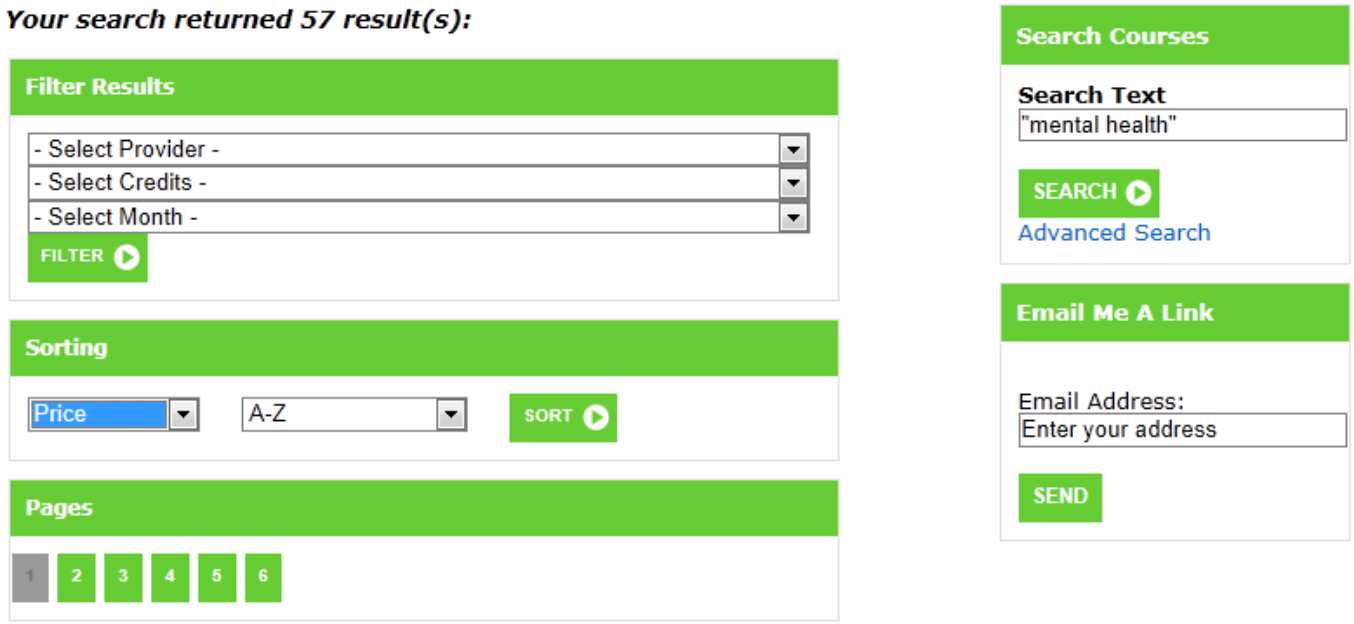
2.2 Filtering & sorting search results

After you have entered search terms and pressed "**SUBMIT"** you will be taken to a new page, showing the results.

This page will show how many results your search terms returned on the left hand side.

Your search returned 351 result(s):

You can then filter these results by either "Provider", "Credits" or "Month". Search results can also now be sorted either alphabetically or by price.



Child And Adolescent Mental Health: Assessment And Care
Organisation: Enhancement University
Course Type: Module
Credits: 15
Price: Contact EP
Practice Hours: Half day per week for 12 weeks

This module provides CAMHS practitioners with an overview of the assessment and treatment of common child and adolescent mental health problems. Students will be able to apply the knowledge and skills...

Dates: 01-2014

Child And Adolescent Mental Health: Key theories and research
Organisation: Enhancement University
Course Type: Module
Credits: 15
Price: Contact EP
Practice Hours: Half day per week for 12 weeks

2.3 Displaying results

When you have found the content you are interested in, clicking on the blue title will take you to a new screen with more details about the course, including details about the cost, location and a fuller description of the training.

There may also be a link to the Education Providers website. This may take you either to the home page of the provider or direct to further details about the course in question.

2.4 Printable version

At the very right hand bottom of the screen there is a link to a "**Printable Version**" of the information

2.5 Email me a link

There is also an option to email a link to the course details. On the left hand side of the screen is a green box entitled **"Email Me A Link**" where you may enter your own email address or another member of staff who may be interested in the course

2.6 Advanced Search

Also on the home page is a link to the "**ADVANCED SEARCH**" function which will take you to a new page and give you the option of entering a number of search parameters such as keyword/course title, education provider or dates.

If you search for content via the advanced search option, you will be given the same features as the basic search such as choosing how many results to display or emailing details of courses etc.

Education & Training Lead (ETL)

The Education & Trust Lead for each eligible organisation will have the responsibility of setting up indirect representatives, allocating budgets to those representatives and submitting the organisation's commissions to the Education Providers.

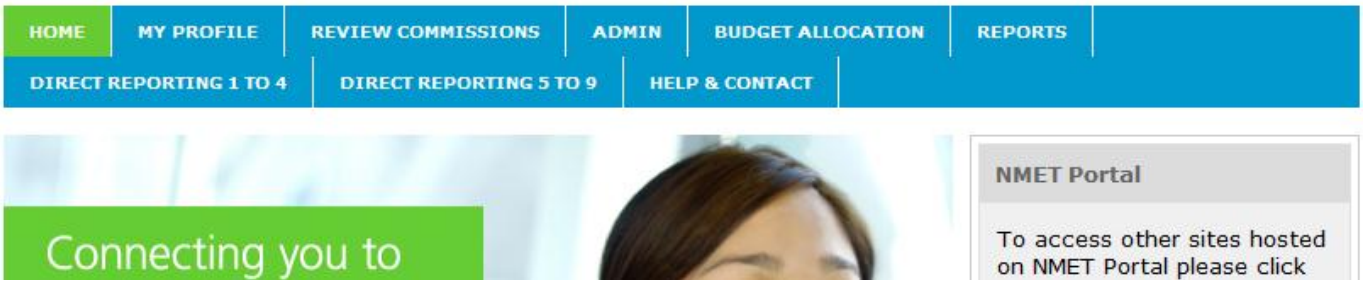
After the initial allocation phase when commissions have been submitted to and reviewed by education providers, the ETL also performs all reallocations until schedule 1B is created and the commissioning stage of the academic year has been completed for the year.

3.1 Logging in as ETL

ETL's will have been issued with a password by the Workforce Development (CPPD) team. Your username is your organisation email address.

Log in with your email address and password in the top right hand corner. If you forget your password, click on the "**Forgotten Password?"** link and follow instructions.

Once logged in as ETL you should see the following menu:



3.2 Setting up Organisation Representatives

ETL's will be able to set up the following roles:

- **CPPD Indirect Representative**: formerly known as Trust Reps. Are allocated a budget and are able to commission training (with final submission from ETL)
- **ETL Delegated Commissioner**: this user will not be able to submit commissions but will have a budget and be able to commission provision. This role will be managed from ETL login and allows the ETL to divide the organisation's budget but still manage it from one login, for example, if you needed to manage the budget of a number of departments. Only the ETL can have the additional role of Delegated Commissioner. The role will not function correctly if added to an indirect rep profile
- **CPPD Direct Band 5-9 Representative**: the process for submitting the 6 monthly direct spend reports will be moved to Portal and setting up an individual as a Direct 5-9 and/or 1-4 rep will give them access to complete the return via Portal
- **CPPD Direct Band 1-4 Representative**: as above.

More than one role can be allocated to an individual but they will only have access to the parts of Portal related to their user profile e.g. a Direct 5-9 Rep will only have access to the Direct Spend Reporting feature. If an Indirect Rep is set up as a CPPD indirect Rep they will be able to access all the features related to this.

To set up a new user, an ETL needs to select the "**ADMIN**" tab from the ETL menu and then "**Create Organisation Representative**" from the "**User Administration**" menu

- Create Organisation Representative
- Manage Organisation Representatives

Complete all the required information. Boxes which have * next to them are mandatory fields and you will not be able to set up users without completing these. Select the role (s) the user requires and click "**SAVE**"

Please note the "**username/Email**" entered should be a working email address the user will be able to access.

When you set up a new user an email will be automatically generated from **nmet@logicsoftware.co.uk** and sent to the new user, providing them with a link to complete the new user creation process by verifying their email address and asking them to set up a password.

3.3 Setting up Delegated Commissioner

As explained above, the Delegated Commissioner role is managed from the ETL login, for this reason, you **do not** need to enter an active email. It does however need to be in a valid format e.g. delegated.commissioner@trust.net or user.guide@nhs.net When "making up" an email address, please keep it mind it must be unique so try to avoid an address that might already be in use by another user. If you are not clear on how to set up a delegated commissioner, please feel free to contact the Workforce Development (CPPD) team.

3.4 Managing Organisation Representatives

ETL's can either edit the details and/or roles of Organisation Reps they have set up, resend a create password email or delete the user if necesary. Please note that you cannot delete users who have budget allocated to them or have outstanding commissions.

This function is found via the **"ADMIN**" tab and then selecting "**Manage Organisation Representatives**"

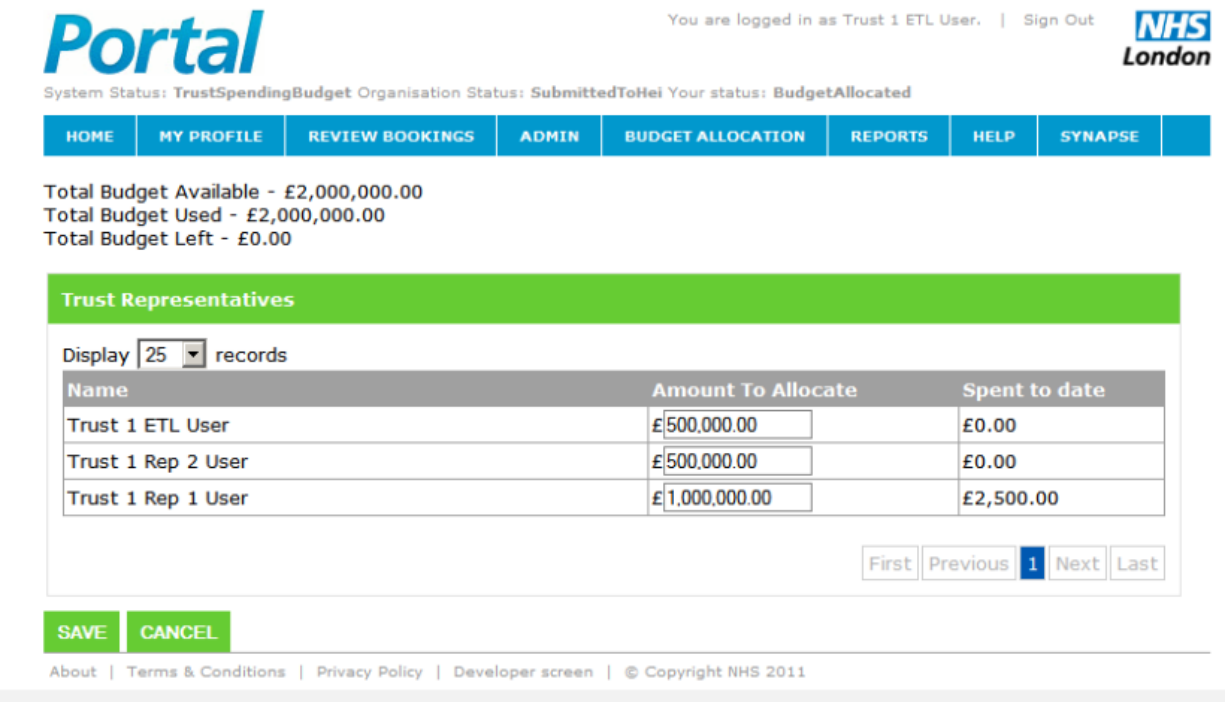
3.5 Budget Allocation

As an ETL you will decide how to split your budget between your indirect reps and yourself and your delegated commissioner profile if you have created one.

You need to allocate budget to yourself and your reps. You cannot commission activity if you have not allocated any budget.

You will be allowed to change their budget at any time, but you cannot reduce it below their current spend to date.

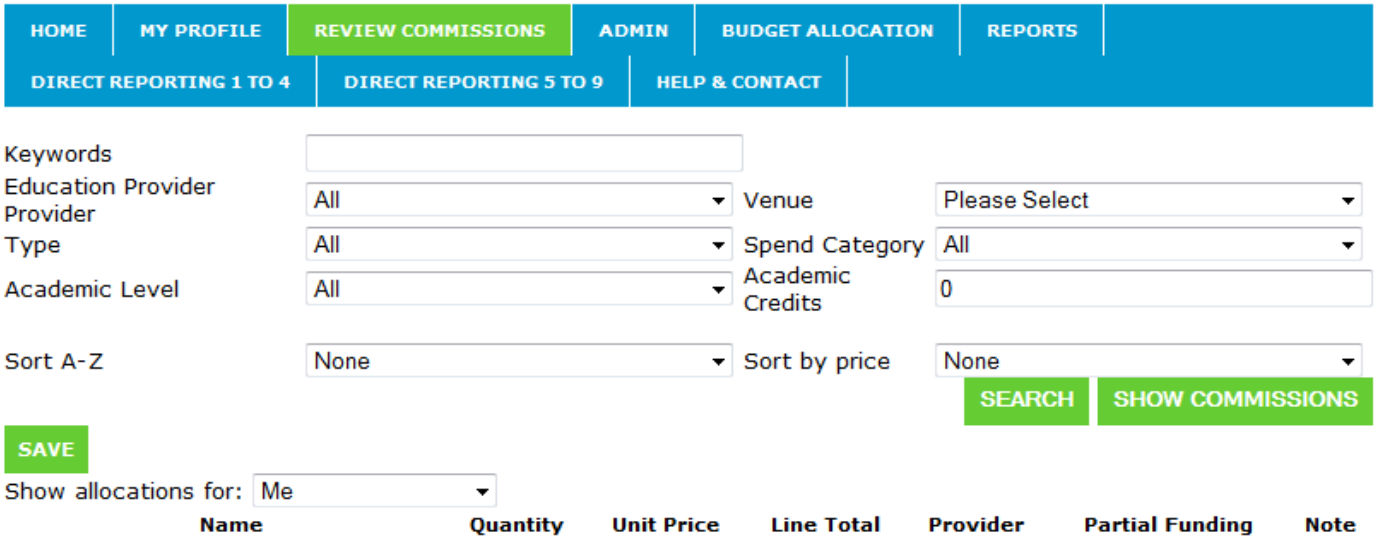
Select **"BUDGET ALLOCATION**" from the ETL view menu and you will be taken to the following screen which will show the name of the Trust Commissioner and any Trust Representatives that have been set up. Please remember to click on SAVE when you have finished.



Enter the amounts to allocate to each user and click the "**SAVE"** button and figures should update immediately.

3.6 Creating commissions

Select the **"REVIEW COMMISSIONS**" tab from the menu and you should see the following at the top of the review commissions screen.



As well as using this screen to create commissions yourself, this is also the page you need to go to see and edit all of your organisation's commissions made by either ETL or indirect reps.

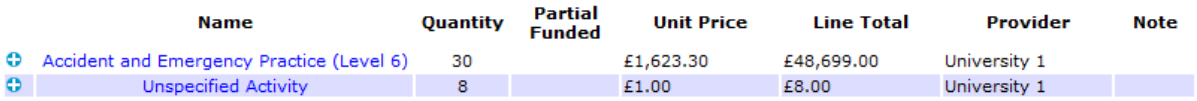
At the top of this page, you have the search boxes. You can search by a keyword included in the name or the description of the provision you are searching for. You can further refine your search by using the various search parameters. Results can again be sorted by alphabetically or by price.

The "**SEARCH**" button will show all courses in the system that matches your criteria. You must enter at least one criteria to search on, such as a provider or a spend category.

The "**SHOW COMMISSIONS**" button will show only those courses that your organisation has at least one allocation on, regardless of the criteria selected.

You will also need to change the Read Only view next to "Show Allocations" to "Me" if you are commissioning for yourself, or to the relevant indirect lead if you are commissioning on behalf of others

Whichever option you select, you will be taken to a view similar to the below.



Name	Quantity	Partial Funded	Unit Price	Line Total	Provider	Note
Accident and Emergency Practice (Level 6)	30		£1,623.30	£48,699.00	University 1	
Unspecified Activity	8		£1.00	£8.00	University 1	

This is a tree view of the courses that match your criteria.

The value in the "**Quantity"** column next to the name is the total number of commissioned places across your organisation for all events on that course.

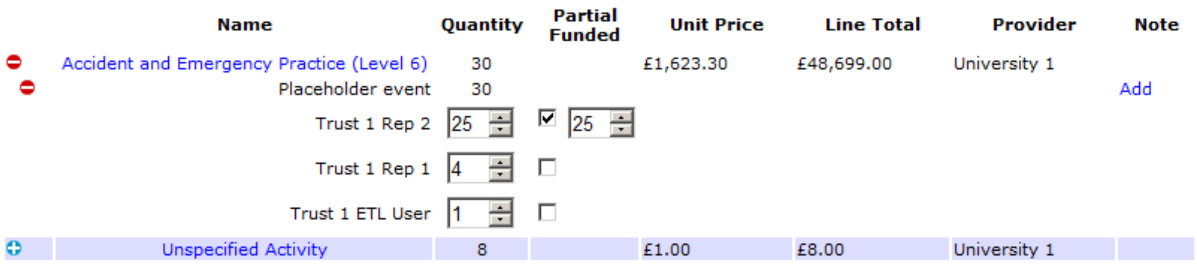
A value in the "**Partial Funded"** column indicates that one or more of the commissions on this course are being partially or fully funded by the attendee. In this case, it is the partial funded value that is used to calculate your commissioning totals.

The table will also show the price for each a place on the course "**Unit Price**", as well as the total cost of the all the currently commissioned places on the course "**Line Total**". Please note that when you are logged in as an ETL or indirect rep you will see the contract price rather than the indicative price which shows on the public search results.

Click on the blue plus to expand the course to see the dates that the course is run on.

Under the course, you will see the list of event dates that the course is held on. The numbers next to the event date show the total allocations across your organisation for that event. Click on the blue plus next to one of the events to show the allocations for that event. Click the plus next to the event to see your commissioning boxes, for you and your representatives.

If you see the term "**Placeholder event**" as shown below this means that there is presently no specific date set for this course.



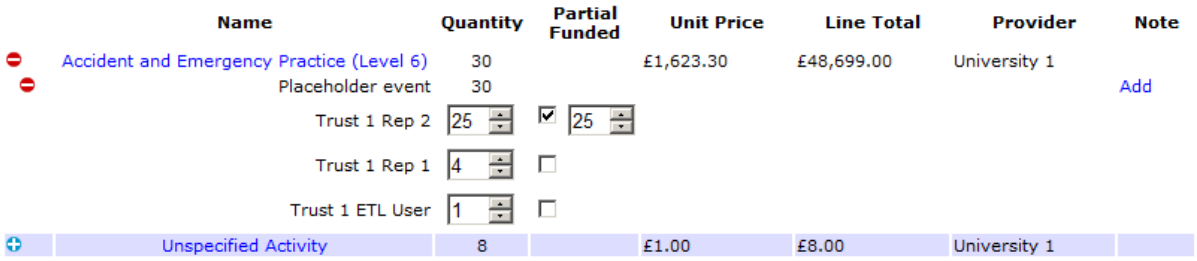
Name	Quantity	Partial Funded	Unit Price	Line Total	Provider	Note
Accident and Emergency Practice (Level 6)	30		£1,623.30	£48,699.00	University 1	
Placeholder event	30					Add
Trust 1 Rep 2	25	☑ 25				
Trust 1 Rep 1	4	☐				
Trust 1 ETL User	1	☐				
Unspecified Activity	8		£1.00	£8.00	University 1	

Notes can be added to the allocation with the Add button in the Note column.

To clear a partial funding value, un-tick the checkbox. This will save your changes and the totals will be calculated using the current quantity, rather than the partial funding value.

4.1 Editing Commissions

To add or change an allocation, expand the course and event date that you wish to change. You will see a list of all your representatives and yourself under the event.



In the quantity column, a text box allows you to enter or edit the number of places commissioned on the course. You can change any or all of these values (including those of your representatives) at any time before your submit your commissions.

The Partial funded column has a tick box in it. If you wish to indicate a partial funding for a commission, tick this box. A second text box will appear alongside where you can enter the partial funded value. To clear the partial funded value, un-tick the box.

If you make a change to commissions made by Reps, you need to inform them of this change. The Portal does not have the capacity to update Reps of changes to their commissions.

4.2 Partial Funding

A course can be partially funded by ticking the tick box and entering a number less than the quantity in the partial funded column. If you have three people attending a course and one of them is paying half, then you would enter 2.5 in the partial funded box. The spend is updated accordingly.

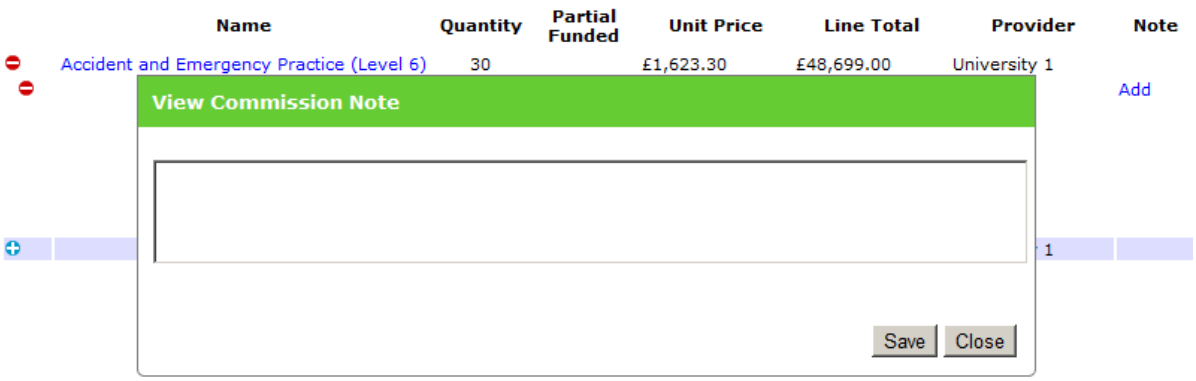
If you make a change to the quantity, the partial funding is reset to the new quantity. This allows you to reduce the quantity on an event without having to first reduce the partial funding amount, as this can never be more than the quantity.

To clear a partial funding value, un-tick the checkbox. This will save your changes and the totals will be calculated using the current quantity, rather than the partial funding value.

4.3 Commission notes

You can add a note to an event at any time during the process. This note will only be visible to you and is not displayed on the Schedule 1B.

Click on the '**Add**' link next to the event that you wish to make the note by. If there is a note on this allocation already, the word is changed to '**Edit**'. The notes you make are specific to the allocation, not the event. When you submit an allocation, the reallocation will have a blank note next to it.



Clicking the '**Add**' or '**Edit**' link opens a popup with a text box. Here you can add or edit the note and click "**Save**" to save your changes or "**Close**" to discard them.

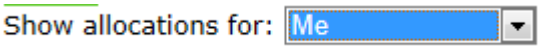
4.4 Saving Commissions

As well as the "Save" buttons, changes to any of the values are saved automatically, meaning you never have to worry about losing your work. As soon as you change a quantity or a partial funding value, the data is saved and the new totals are calculated.

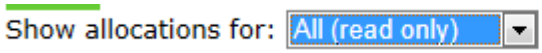
4.5 Reviewing commissions made by organisation reps

ETL's have responsibility for reviewing and approving or rejecting commissions made by organisation reps via the "**REVIEW COMISSIONS**" tab.

Below the search boxes on this screen you can filter the commissions that have been made. You can view either "**All**" the commissions made by your organisations' users, view your own commissions as an ETL "**Me**" or filter by the name of the indirect reps.



Please note if you select "**All**" you can only view the commissions on a read only basis.



To edit, approve or reject commissions you need to filter by the Rep whose commissions you are reviewing.

To edit an organisation reps commission, you need to expand via the entry via the white cross in the blue circle, following the method you would use to edit or amend your own commissions. If you wish to increase or decrease the places, simply change the figure in the **Quantity** box. If you wish to reject the commission from the rep altogether, change the quantity to zero. If you want to approve the commission and are happy with the places, you do not need to alter the information.

Click "Return commissions to rep" once you are have completed reviewing the commissions. Any budget from commissions you have rejected will return to the budget of the organisation rep in question. The organisation rep can then continue to commission places and submit them to the ETL to be approved or rejected.

This process can be repeated as many times as required **until** commissions have been submitted to Education Providers. At this point organisation reps **will not** be able to commission provision but the ETL will be able commission against an individual organisation reps budget (see **4.7 Reallocation**)

4.6 Submitting Commissions

Once you and your organisation representatives have finished the allocation phase, click the "**SUBMIT COMMISSIONS**" button at the bottom right of the screen to submit them to Education Providers. You **will not** be able to submit if your organisation has over allocated your budget.

It is vital to note that you should only submit commissions when you have **completed** the Commissioning phase as your commissions will be essentially locked down once you have submitted whilst your commissions and you will not be able to edit or add to your commissions at this stage.

The **submission summary** screen will be displayed when your submission was successful. You can see your own commissions in the top table and your representatives' commissions in the lower table. Any notes that have been added to the commissions are also displayed.

If you return to the **Review Commissions** screen, you will see a read only view. This will remain this way until the Education Providers have dealt with your commissions. Once they have approved and rejected your commissions, you will move to the Reallocation phase.

4.7 Reallocation

The reallocation phase is just between the ETL and the Education Providers. The organisations representatives are not able to commission any further provision at this stage.

As ETL you will receive an email from **nmet@logicsoftware.co.uk** to the email account linked to your profile, summarising your organisations rejected allocations. This email will list the name of the provision, date of delivery, places, rejection reason and "User Who Allocated". Organisation Reps will also receive a summary of their rejected activity.

If an organisation rep has activity rejected by an education provider, the rejected budget will be returned to that organisation reps budget. Whilst the organisation rep can no longer commission, the ETL can commission on behalf of that organisation rep, commissioning from the reps remaining budget.

To commission against a reps budget, simply follow the usual process for commissioning activity. In the reallocation phase as you expand via the white cross in the blue button, the names of reps with available budget will show and simply add the amount of places you wish to commission in the **Quantity** box against that reps name.

The previous allocations are shown as read only numbers for historical purposes. After finishing the reallocations, click the submit button to send them to the Education Providers. The Education Providers will approve and reject your re-commissions and the cycle will continue. As you go through the reallocation process, any approved reallocations will be added to your total.

Information for organisation Indirect Representatives

In order to be set up as an indirect rep, please speak to your ETL who can create a user profile for you and allocate budget. When your ETL has added you to the system, you will receive an automated email from **nmet@logicsoftware.co.uk** which will prompt you to verify your email address and set up a password via a link to Portal. If you know you have been set up but not received the validation email, please check your spam or junk mail folder.

As an indirect representative you will be able to search for provision and spend your budget allocation. Please remember that your ETL will have to approve any commissions you make

5.1 Logging in

The URL for the portal is https://nmetportal-london.nhs.uk/ please remember to update and change any bookmarks or favourites you may have set up for the 14/15 commissioning cycle.

In the top right hand corner are boxes for you to enter your email address and password. When logged in, you should see the following menu:

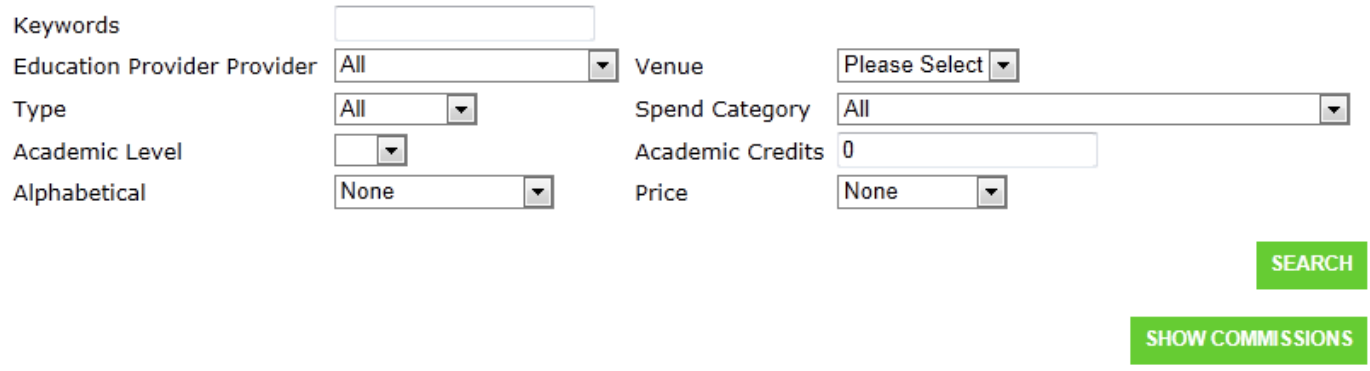
NB: you will only have the **DIRECT REPORTING** tab visible if you have been sent up to complete direct reporting returns.

5.2 Searching for content

When you are logged in, selecting the "**REVIEW COMMISSIONS**" option on the above menu will take you to the review commissions screen. Via this screen, you will be able to search for courses and allocate places to these courses. The allocations are saved to the website whenever you click or tab away from the allocation text box so you do not need to worry about losing work or data.

The review commissions screen is split into three parts.

The first is the **course search filters** at the top of the page. Here you can search for a word or phrase in the name, description or keywords and refine your results with the other criteria.



Click the **"SHOW COURSES**" button to show all courses that match your criteria, or the "**SHOW ALLOCATIONS**" button to show the courses that match your criteria that you have already allocated against.

The middle part of the screen is the course list. This shows a tree view of all the courses returned by the search.

	Name	Quantity	Unit Price	Line Total	Provider	Partial Funded	Note
⊕	Acute Oncology	2	£970.00	£1,940.00	Enhancement Universi		
⊕	Anaesthetic Nursing Two	1	£970.00	£970.00	Enhancement Universi		
⊕	Cancer Care Recovery And Survival	1	£970.00	£970.00	Enhancement Universi		
⊕	Long Term Conditions And Case Management	2	£970.00	£1,940.00	Enhancement Universi		

Clicking the plus and minus icons will show and hide the events on that course. The title of the course and the date of the events are shown in the next column.

Clicking on the name of the course will open that course's details screen in a new window to give you full details about the course.

The cost of the course is shown next to the name of the course and notes can be added or edited with the 'Add Note' link on the far right

5.3 Commissioning Places

When you expand a course, you will see the events that the course is running on, with a box for each date that course is running. Simply enter the number of places you wish to book on the particular course in the "**Quantity**" column

	Name	Quantity	Unit Price	Line Total	Provider	Partial Funded	Note
⊖	Acute Oncology	2	£970.00	£1,940.00	Enhancement Universi		
	01/01/2014	2					Add
⊖	Anaesthetic Nursing Two	1	£970.00	£970.00	Enhancement Universi		
	01/01/2014	1					Add
⊕	Cancer Care Recovery And Survival	1	£970.00	£970.00	Enhancement Universi		
⊕	Long Term Conditions And Case Management	2	£970.00	£1,940.00	Enhancement Universi		

You can amend these values at any time before you submit your commissions to your ETL. Please note, you will need to stay within the budget you have been allocated to submit your commissions.

5.4 Partial Funding

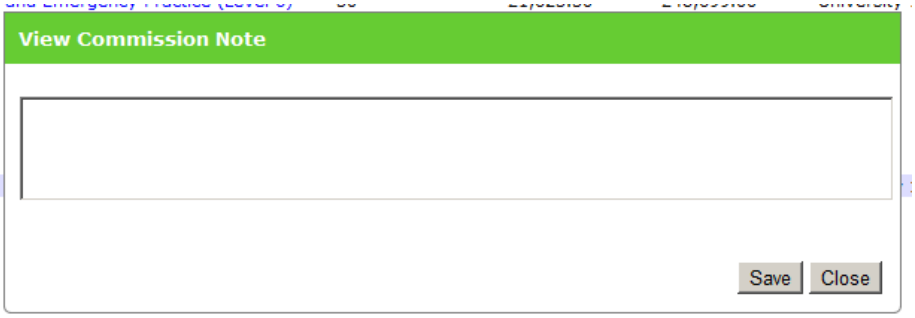
A course can be partially funded by ticking the tick box and entering a number less than the quantity in the partial funded column. If you have three people attending a course and one of them is paying half, then you would enter 2.5 in the partial funded box. The spend is updated accordingly.

If you make a change to the quantity, the partial funding is reset to the new quantity. This allows you to reduce the quantity on an event without having to first reduce the partial funding amount, as this can never be more than the quantity.

To clear a partial funding value, un-tick the checkbox. This will save your changes and the totals will be calculated using the current quantity, rather than the partial funding value.

5.5 Adding notes to commissions

Notes can be added to any of your allocations, at any time during the process.



The '**Add Note'** text on the far right hand column will change to '**Edit Note'** if a note is present on that allocation. Clicking on the link will open a pop up dialog with a text box for you to type the note in. Click "**Save**" to save the changes to the note or "**Close"** to discard those changes.

5.6 Saving commissions

Any commissions you make or changes are saved immediately and the totals updated automatically.

At the bottom of the screen is the totals table. Here you can keep track of how many places you have allocated and the total cost of those allocations.

The spinning image indicates that your allocations are being sent to the web server and the totals are being recalculated

When the save is complete, the new totals are displayed.

5.7 Submitting commissions

The "**SUBMIT BOOKINGS"** button allows you to submit your commissions to your ETL when you have completed your commissioning.

The ETL will accept your commissions, edit or reject them. The process for managing this should be agreed at a local level. Portal does not have the capacity to inform a Rep of changes to their commissions that have been made by your ETL.

Whilst your ETL is approving or rejecting your commissions, you will not be able to edit or add to your commissions, until your ETL has completed this stage. If you have budget remaining, once your ETL has reviewed your commissions, these will be returned to you and you can continue to commission and repeat the submission to your ETL.

This stage can be repeated as many times as required until your ETL has submitted your organisations commissions to the Education Providers. At this stage, you will only be able to review your commissions on a read only basis and will no longer be able to commission activity.

HELP & CONTACT

For any Workforce Development (CPPD) queries please email: CPPD@southlondon.hee.nhs.uk